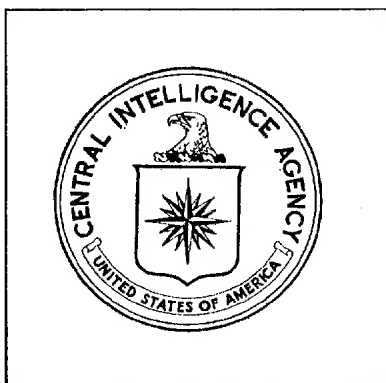


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Romania:

A New Market for US High-Performance Civil Aircraft

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ER RP 73-7

May 1973

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ROMANIA: A NEW MARKET FOR US
HIGH-PERFORMANCE CIVIL AIRCRAFT

Summary

1. In March 1973 the United States made its initial penetration of the Warsaw Pact civil aviation market with the sale of three Boeing 707s to Romania for \$45 million. Romania's national airline Transporturile Aeriene Romine, TAROM, will use the 707s on its longer hauls, including its anticipated new service to New York. Service to New York may begin early in 1974, providing a US-Romanian air agreement is concluded.

2. The 707 deal has opened the door for additional sales of US aircraft. The Boeing 727 is high on the list as a technically superior aircraft which meets Romanian needs for both scheduled and charter international service. Moreover, the initial Boeing sale has established a highly acceptable financing precedent -- that is, a cash downpayment of only 10%. On this basis, Romania probably will purchase as many as seven 727s within a year or two.

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Note: Comments and queries regarding this publication are welcomed. They may be directed to [REDACTED] of the Office of Economic Research, Code 143, Extension 7884.

3. Among the airlines of Eastern Europe, TAROM ranks midway between Czechoslovakia's CSA and East Germany's Interflug, but it is dwarfed by most non-Communist international airlines. It operates a summer schedule of 51 weekly flights to 22 foreign cities over a route network of some 13,500 miles. More than one million passengers were carried in 1972 on domestic and international routes. Scheduled international service extends from London to Algiers and Cairo, with most business concentrated in Europe. The extensive domestic service includes 265 weekly flights to 13 cities. Service is reduced markedly during the winter, especially on domestic operations.

4. TAROM's present aircraft inventory is inadequate to cope with its current passenger volume, much less the expected 1975 traffic. Its seven British BAC-111s are used exclusively on international routes. Its obsolete Soviet-built aircraft -- including IL-18s, AN-24s, IL-14s, AN-2s, and LI-2s -- are generally confined to domestic passenger and freight operations. Romania made its initial move to add "state of the art" aircraft by acquiring the BAC-111s in 1968. Subsequently, three long-range IL-62 jet

aircraft were bought from the USSR, two of which were delivered in April 1973.

5. Over the next few years TAROM is expected to inaugurate service to Peking via South Asia in addition to the anticipated New York service.

Discussion

Historical Perspective

6. Romania's civil air operations started after World War II when the joint Romanian-Soviet stock company Societatea de Transporturi Aeriene Romano-Sovietica (TARS) was established. Full control passed to Bucharest in 1954, and the Romanian national airline TAROM was formed to handle domestic and international service. Almost immediately, TAROM began laying the groundwork for the expansion of service to countries in Western Europe. Romania remained dependent on the USSR for aircraft until the late 1960s.

7. After a decade of exclusively civilian management, in 1965 several military officers were given key positions in TAROM. This military-civilian mix lasted until late in 1972, when the airline was shifted from its traditional position within the Ministry of Transportation to the

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Ministry of Defense, apparently in an effort to improve operational efficiency. Even though military officials are in nominal control, civilian managers play an important part in mid-level management and in day-to-day operations.

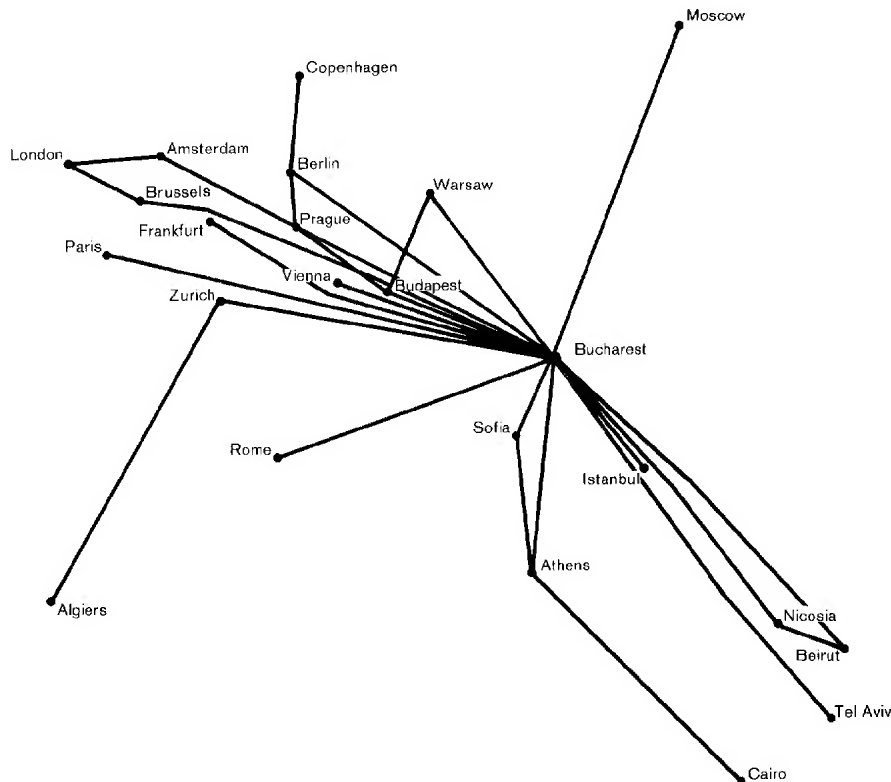
8. TAROM ranges in size and operations midway between Czechoslovakia's CSA¹ and East Germany's Interflug among East European airlines. During most of its history, TAROM has served more as an economic and diplomatic link with selected countries rather than as a competitive international carrier. Within five years after expanding service to Western Europe from its existing network within the Warsaw Pact area, TAROM was operating into most of the capitals of Western Europe. Moreover, since the early 1960s a few new routes have been added to North Africa and the Middle East (see the map). TAROM is the only Communist airline serving Israel. TAROM belongs to the "Six Pool Agreement," an association formed by Warsaw Pact members in 1957 to regulate intra-Communist civil air service, fares, technical support, and the pooling and division of revenues. In 1965, Romania became a member of the International Civil Aviation Organization (ICAO).²

¹. See ER RP 73-4, Czechoslovakia's International Civil Airline, April 1973, FOR OFFICIAL USE ONLY.

². Currently all the Warsaw Pact countries except East Germany are members of ICAO.

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Romania: TAROM's International Route Network, May 1973



Romania: TAROM's Schedule of Flights, Summer 1973

To Non-Communist Countries

Route	Trip Number	Flights per Week	Type of Aircraft
Bucharest-East Berlin-Copenhagen	201	2	BAC-111
Bucharest-Sofia-Athens	203	2	BAC-111
Bucharest-Brussels-London	205	2	BAC-111
Bucharest-Amsterdam-London	209	1	BAC-111
Bucharest-Paris	211	4	BAC-111
Bucharest-Vienna	213	5	BAC-111
Bucharest-Frankfurt	215	4	BAC-111
Bucharest-Istanbul	219	2	AN-24
Bucharest-Zurich-Algiers	223	1	BAC-111
Bucharest-Zurich	227	2	BAC-111
Bucharest-Prague-Amsterdam	229	1	BAC-111
Bucharest-Rome	235	2	BAC-111
Bucharest-Nicosia (1) - Beirut	239	2	BAC-111
Bucharest-Athens-Cairo	241	1	BAC-111
Bucharest-Tel Aviv	245	5	BAC-111

To Communist Countries

Bucharest-Moscow	207	5	BAC-111
Bucharest-Sofia	208	1	AN-24
Bucharest-Budapest-Warsaw	225	2	BAC-111
Bucharest-Prague (1) -East Berlin	231	3	BAC-111
Bucharest-Budapest (2)-Prague	233	3	BAC-111
Bucharest-Warsaw	251	1	BAC-111

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Fleet Inventory

9. Except for seven British BAC-111-400s used exclusively for international service and two recently delivered Soviet long-range jet IL-62s, TAROM's aircraft inventory consists of obsolete Soviet-built aircraft, most of which are more than 10 years old. Domestic routes are served by nine turboprop AN-24s and 14 prop IL-14s. TAROM's 12 IL-18s -- the largest fleet outside the Soviet Union -- serve as backup to the BAC-111s on the international routes and handle most of the charter and cargo flights. Small prop aircraft (6 LI-2s and 10 AN-2s) round out TAROM's civil air fleet.

10. The mix in TAROM's civil air fleet inventory and aircraft on order is unique among Warsaw Pact countries, reflecting past ties with the USSR and a more recent independent stance by Bucharest in aviation matters. For more than a decade following the establishment of an independent TAROM service, Romania used only Soviet-built aircraft. By the mid-1960s, however, Bucharest was openly dissatisfied with the cost and operational characteristics of these aircraft and began investigating Western sources of high-performance civil aircraft. In mid-1968, after

2 years of evaluation, the Romanians purchased six³ British Aircraft Corporation (BAC) medium-range 111-400s for US \$45 million. This purchase marked Bucharest's entry into the modern era of civil aviation. Moreover, it was the first acquisition of Western jet aircraft by a Warsaw Pact country. Romania, however, did not jettison its ties with the USSR; in 1970 it ordered three IL-62s, at that time the most modern high-performance long-range civil aircraft produced by the Soviet Union.

The Boeing Deal

11. Even before the IL-62s were delivered, Romania apparently was having second thoughts about the operational effectiveness of these aircraft, which had been involved in a number of crashes. Consequently, Bucharest initiated negotiations with Boeing in 1972 for the 707 jet airliner and signed up for three in March 1973 at a total cost of about \$45 million. Romania thus became the first Warsaw Pact country to purchase high-performance US jet civil aircraft for its civil air fleet. The first of the 707s is scheduled for

3. In late 1971 and early 1972, TAROM acquired two used BAC-111s, one directly from American Airlines and the other through the British Aircraft Corporation, previously in service with Philippines Airlines.

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delivery in February 1974; the other two in May and June. Two of the aircraft will be in a passenger configuration; the remaining one is scheduled for President Ceausescu's personal use. Romania's initiative in purchasing the IL-62s and the 707s clearly was keyed to the anticipated opening of long-haul service to Peking and New York.

12. The 707 sale may be a precursor of additional sales of US civil aircraft to Romania. Romanian officials have already expressed interest in acquiring as many as seven medium-range 727-200s to replace the BAC-111s now used on almost all of TAROM's international routes. The 727 is well-suited to Romania's needs, both on scheduled services and on extensive charter operations. It can carry up to 189 passengers in a tourist configuration and is one of the most popular aircraft on the market today.

13. The financing package, which was one of the key factors in closing the 707 deal, should facilitate future US sales. Boeing was able to arrange 10-year loans of about \$20 million each by the Export-Import Bank and Morgan Guaranty Trust Co., leaving only a 10% cash outlay for

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Romania. Bucharest's longstanding shortage of hard currency has made it almost impossible to undertake cash payment for aircraft. The only avenues open have been to buy Western aircraft under barter agreements or by arranging offset financing through the sale of products in third countries for the necessary hard currency. Such arrangements were unacceptable to US aircraft manufacturers in their earlier attempts to sell Romania aircraft, although the British had accepted offset financing arrangements in their sale of the BAC-111s in 1968. During the initial discussions, Boeing also was willing to accept offset financing, providing the price of the aircraft was raised 10%. Bucharest demurred and opted for the current arrangement.

14. Although the United States now has the inside track into the Romanian civil aviation market, it can expect competition from other Western manufacturers. Indeed, any Western aircraft manufacturer willing to assist the Romanians in establishing indigenous aircraft manufacturing facilities has a good opportunity for entry into the market. Before its destruction in World War II, Romania's small aircraft industry produced a variety

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of French, German, and Italian aircraft under licensing arrangements. For more than two decades after the war, little was done to rebuild the industry because Romania lacked the resources. The first major move in this direction was made in 1968 as part of the BAC-111 deal that provided for assembly in Romania of some 210 twin-engine ten-passenger Britten-Norman Islander aircraft. The Romanians have been producing about one aircraft per week since 1970 using parts imported from England. The completed aircraft are returned to Britain and sold on the world market by the Britten-Norman Company for about \$100,000 each -- substantially below the prices of comparable aircraft produced in the United States. Both parties have been quite satisfied with the arrangements thus far.

15. Romania apparently now has its sights set on manufacturing more sophisticated aircraft. In conversations with Boeing officials, President Ceausescu mentioned the possibility of Romania building a medium-range jet aircraft for TAROM that also had export potential.

TAROM's Current Operations

16. TAROM's international route network radiating from Bucharest extends some 13,500

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unduplicated miles from London to Moscow and from Scandinavia to Cairo. The airline serves all the Warsaw Pact countries, and 16 non-Communist countries with 51 weekly international flights, two-thirds of which are to non-Communist countries (see the map). Most service is concentrated in Western Europe. There are five weekly flights to Israel. Five of the 15 weekly flights within the Warsaw Pact operate to Moscow with the remainder split about evenly among Budapest, East Berlin, Prague, Sofia, and Warsaw. As for domestic operations, TAROM operates 265 weekly flights to 13 cities.

New Agreements and Service

17. Romania, which has been adding non-European routes at a conservative pace, has been preparing for future expansion. Six new air agreements have been signed since 1968: the Central African Republic and the United Kingdom in 1970, Morocco and Finland in 1971, and Burma and the People's Republic of China (PRC) in 1972 (see Table 1).

18. Concurrent with an increase in frequency of flights to Western Europe during the past three years, TAROM has also inaugurated service to three additional non-Communist countries -- Algeria,

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Table 1

**Romania: Civil Air Agreements with Non-Communist
Countries and Yugoslavia as of May 1973¹**

Country	Year	Country	Year
Austria	1958	Lebanon	1967
Belgium	1956	Morocco	1971
Burma	1972	Netherlands	1957
Central African Republic	1970	Norway	1958
Denmark	1958	Sweden	1957
Egypt	1958	Switzerland	1960
Finland	1971	Turkey	1965
France	1962	United Kingdom	1970
Ghana	1962	West Germany	1961 ²
Greece	1960	Yugoslavia	1959
Israel	1968		
Italy	1965 ²		

1. Romania also has longstanding air agreements with all the Warsaw Pact countries and a newly signed air accord with the PRC - signed in April 1972.
2. Provisional agreement.

Cyprus, and the Netherlands. Each was added as an integral part of existing routes. For example, flights to Amsterdam began in 1970 as an extension of service to Prague. About a year later, Nicosia was made an intermediate stop on flights to Beirut, based on a provisional landing right agreement. TAROM's newest service to Algiers is an extension of its Zurich route.

Bucharest-New York Service

19. The most important new TAROM service in the future will be Bucharest-New York flights.

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The Romanians would like to begin this operation in April 1974, but inauguration of service will require further negotiations and the signing of a US-Romanian bilateral air agreement. Earlier talks, held in 1968, foundered because of Bucharest's refusal to ease restrictions on US commercial civil aviation rights in Romania. Nonetheless, because of a desire to spur tourism, Pan Am was permitted to begin a unilateral New York-Bucharest service in 1970. Pan Am has operated twice-weekly service to Bucharest for the past 2 years. Romanian officials are expected to request talks with the United States this fall and may sign an agreement similar to US agreements with Czechoslovakia and Poland completed in 1969 and 1972, respectively.

Bucharest-Peking Service

20. Even before New York flights begin, TAROM is expected to inaugurate a Bucharest-Peking⁴ service, perhaps by the fall of 1973. The Romanian-PRC air agreement signed in April 1972 would be the basis for this link. A joint service by TAROM and CAAC -- China's civil airline -- has been discussed, with each airline operating on alternate

4. See ER IM 72-164, China: Expanding Horizons for International Air Service, November 1972, SECRET/NO FOREIGN DISSEM.

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weeks. In recent months the Chinese have highlighted their desire to begin flights to Eastern Europe, including Yugoslavia, by opening a CAAC information office in Tirana and by operating a series of test flights using their IL-62 aircraft into Bucharest, Tirana, and Belgrade.

Passenger Traffic and Airports

21. Domestic and international air traffic has more than tripled in the past decade, reaching an estimated 1.1 million passengers in 1972 (see Table 2). Even though substantial gains have been

Table 2

Romania: TAROM's Passenger Carriage

	Thousand Passengers					Percent of Total	
	Scheduled Service			Charter Service ¹	Total	Scheduled	Charter
	Domestic	International	Total				
1972 ²	298	196	494	655	1,149	43	57
1971	235	194	429	528	957	45	55
1970	291	162	453	396	849	53	47
1965	147	78	225	146	371	61	39
1963	214	51	265	100 ²	365 ²	73 ²	27 ²

1. More than 75% of charter operations are in international service, mostly within Europe.

2. Estimated.

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recorded in scheduled service, by far the greatest growth has occurred in TAROM's extensive charter operations. Indeed, charter service now accounts for some 60% of TAROM's total passenger carriage, compared with some 40% eight years ago. More than 75% of TAROM's charter operations are international service, mostly within Europe. Scandinavian and West German tourists traveling to Romania's Black Sea resorts account for much of the charter traffic.

22. In order to accommodate existing and expected growth in service, airport facilities have been upgraded throughout the country, particularly in the coastal resort areas. In 1970, Otopeni Airport, outside of Bucharest, was opened to civilian traffic and currently serves as Romania's major international airport. It replaced Baneassa, also in the Bucharest environs, which now handles mostly domestic flights, but occasionally back-stops Otopeni.

Air Safety

23. Early in the 1960s, TAROM had a series of accidents which in part were responsible for changes that included the assignment of several military officers to key position in the organization in 1965. Since then, air safety has improved.

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Nonetheless, one of TAROM's newly acquired BAC-111s crashed in 1970, killing 18 of the 27 passengers on board. In another instance, a non-fatal crash occurred in November 1971 involving an AN-24. Both accidents took place under poor weather conditions.

Prospects

24. The next three to five years will be marked by the expansion of TAROM's international air services, including both scheduled and charter operations. In addition to the opening of service to New York and Peking, mentioned above, other likely candidates include Tehran, Calcutta, Shanghai, and eventually Tokyo. Over the longer term, TAROM may also serve South America via Africa.

25. Because of the expansion of routes and the desire to increase the frequency of service on existing routes, Romania almost certainly will be in the market for additional modern aircraft. Although the purchase of a few more long-range jets is expected, Romania's primary emphasis will be on medium-range jets to meet the needs of both its domestic routes and its shorter international routes. Among available jets the medium-range Boeing 727 and the medium- to longer-range Soviet TU-154 are the prime contenders. The recent crash

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in Prague of a TU-154 has raised some doubt concerning its safety. Nonetheless, Western observers consider the aircraft to be generally sound, and it is well suited for Romanian requirements.

26. The Boeing 727 would appear to be the leading contender among the medium-range jets not only because of its superior performance and prestige but also because of the availability of easy financing from US lenders. Negotiations no doubt will be protracted. Even if Romania proposed that Boeing set up an aircraft manufacturing plant as a quid pro quo for aircraft sales, a Boeing refusal probably would not torpedo the talks. Eventually, Boeing might agree to set up a spare parts manufacturing facility as an alternative to building a complete jet aircraft plant. The company may even agree to assist in building a plant for the fabrication of a smaller aircraft, although it is not certain whether this would satisfy Romania's desire to establish a broad-based domestic aircraft industry. In any event, Bucharest almost certainly would not ask the USSR to set up a plant as an alternative to Boeing.

27. These additional sales to Romania would add only a small amount to US civil aircraft

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exports, which totaled \$2.9 billion in 1972. They would nevertheless enhance prospects for sales to other countries of Eastern Europe, a market long monopolized by the USSR. Most of these countries have become disenchanted with the performance and economics of Soviet aircraft. Although no formal discussions have been held, Poland and Hungary are the most likely candidates to follow Romania in straying from the fold. Penetration of the East European market also could mean increased sales of advanced airborne and ground support avionic systems, another area of lagging technology in Eastern Europe.

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